

**Key Information Summary Sheet**  
**Training for CDA Special Loan Programs Housing Rehabilitation**  
**Specialists**

**Request for Proposals No. 10-25-002**



**RFP Issue Date:** August 24, 2009

**Procurement Officer:** Ann Goldman  
goldmanA@mdhousing.org  
410-514-7113  
(FAX) 410-987-4676

**Submit Proposals to:** Dept. of Housing and Community Development  
Attention: Ann Goldman  
100 Community Place, Room 2.613A  
Crownsville, MD 21032-2023

**Proposals Due:** September 15, 2009, 2:00 pm local time

**Anticipated Contract Start:** October 2009

Minority Business Enterprises and Small Businesses are encouraged to respond to this solicitation

Notice: Any prospective Offeror who received this document from a source other than the Issuing Office should immediately advise the Issuing Office of its name and mailing address, so that amendments to the RFP and other communications can be sent to them.

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### **Attachments**

- A. Contract Terms**
- B. Price Proposal Form**

## **SECTION 1 - GENERAL INFORMATION**

### **1.1 Purpose**

The Maryland Department of Housing and Community Development (DHCD), a principal department of the State of Maryland (State), is seeking a qualified Contractor to provide training seminars for local housing rehabilitation specialists who are part of the Community Development Administration (CDA) Special Loan Programs network. Specific services to be provided are outlined in Section 3.

### **1.2 Procurement Method**

This Contract will be awarded in accordance with the small procurement regulations under COMAR 21.05.07.

### **1.3 Questions**

Questions will be accepted from prospective Offerors and should be submitted in a timely manner to the Procurement Officer only. E-mail submission of questions is preferable, but questions will also be accepted by phone, mail or facsimile to the Procurement Officer. The Procurement Officer will decide whether an answer can be given before the closing date, based on the availability of time to research and communicate an answer. Answers to all substantive questions that have not previously been answered, and are not clearly specific only to the requestor, will be distributed to all vendors who are known to have received a copy of this RFP.

### **1.4 Procurement Officer and Issuing Office**

The sole point of contact at the State for purposes of this RFP is the Procurement Officer at the Issuing Office listed on the Key Information Summary Sheet.

### **1.5 Contract Manager**

After contract award and throughout the course of the project, the Contract Manager listed below (or designee) will monitor the performance of the Contractor.

Eileen Hagan  
Department of Housing and Community Development  
100 Community Place  
Crownsville, MD 21032  
Tele: 410-514-7542  
Email: [hagan@mdhousing.org](mailto:hagan@mdhousing.org)

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**1.6 Duration of Offer**

Offers submitted in response to this RFP are irrevocable for sixty (60) days following the closing date for proposals. The Procurement Officer may extend this period, with the Offeror's written consent.

**1.7 Revisions to the RFP**

If it becomes necessary to revise this RFP, amendments will be provided to all prospective Offerors that were sent this RFP or otherwise are known by the Procurement Officer to have obtained this RFP. Failure to acknowledge receipt does not relieve the Offeror from complying with all terms of any such amendment.

**1.8 Cancellation / Rejection**

The State reserves the right to cancel this RFP at any time prior to contract award pursuant to COMAR 21.06.02.02. The State also reserves the right to accept or reject, in whole or in part, any and all offers received in response to this RFP, and to waive or permit cure of minor irregularities in any manner necessary to serve the best interests of the State of Maryland.

**1.9 Contract Type**

The Contract awarded as a result of this RFP shall be a firm fixed price contract as provided in COMAR 21.06.03.02.A.1.

**1.10 Compensation and Method of Payment**

The Contract will provide that the Contractor be paid a per training seminar price in accordance with the Contractor's Price Proposal Form, Attachment B upon submission of and approval by DHCD of an invoice containing appropriate detail.

**1.11 Work Products**

All work products prepared under the terms of this contract are the property of the State, and shall be delivered to DHCD at the end of the contract in a form useable and acceptable to DHCD.

**1.12 Parties to the Contract**

The contract entered into as a result of the response to this RFP shall be by and between the successful Offeror as Contractor and DHCD, and shall include the terms and conditions of Attachment A of this RFP and generally the provisions of this RFP. Any exceptions must be clearly identified in the Executive Summary section of the Technical Proposal. Attachment A is included for information only and is not to be submitted with the Offeror's proposal.

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**1.13 Minority Business Enterprises (MBEs)**

Minority Business Enterprises (MBEs) are encouraged to respond to this solicitation. MBE vendors are encouraged to obtain MBE certification from the Maryland Department of Transportation, Office of Minority Business Enterprise. Direct all certification-related questions to:

Office of Minority Business Enterprise  
Maryland Department of Transportation  
P.O. Box 8755  
BWI Airport, Maryland 21240-0755  
(410) 859-7328  
[http://www.mdot.state.md.us/MBE\\_Program/](http://www.mdot.state.md.us/MBE_Program/)

**1.14 Small Businesses**

Although this is not a Small Business Reserve procurement, small businesses are encouraged to respond to this solicitation and to register with the Maryland Department of General Services for the Maryland Small Business Reserve Program through a self-certification process at <https://www.smallbusinessreserve.maryland.gov/registration/>.

A “Small Business” is a business, other than a broker, that meets the following criteria:

- The business is independently owned and operated;
- The business is not a subsidiary of another business;
- The business is not dominant in its field of operation;
- The wholesale operations of the business did not employ more than 50 persons, and the gross sales of the business did not exceed an average of \$4,000,000 in its most recently completed 3 fiscal years;\*
- The retail operations of the business did not employ more than 25 persons, and the gross sales of the business did not exceed an average of \$3,000,000 in its most recently completed 3 fiscal years;\*
- The manufacturing operations of the business did not employ more than 100 persons, and the gross sales of the business did not exceed an average of \$2,000,000 in its most recently completed 3 fiscal years;\*
- The service operations of the business did not employ more than 100 persons, and the gross sales of the business did not exceed an average of \$10,000,000 in its most recently completed 3 fiscal years;\*
- The construction operations of the business did not employ more than 50 persons, and the gross sales of the business did not exceed an average of \$7,000,000 in its most recently completed 3 fiscal years;\* and

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- The architectural and engineering operations of the business did not employ more than 100 persons, and the gross sales of the business did not exceed an average of \$4,500,000 in its most recently completed 3 fiscal years.\*

\*If a business has not existed for three years, the gross sales average is computed for the period of the business's existence. For newly formed businesses the determination will be based upon employment levels and projected gross sales.

**SECTION 2 – MINIMUM QUALIFICATIONS**

The Offeror shall have a minimum of five (5) years experience providing training services to local or state government staff in the area of housing rehabilitation, specifically as related to specification writing and cost estimating.

**SECTION 3 – SCOPE OF SERVICES**

**3.1 General Information**

- A. The Contractor shall provide two (2) one-day training seminars for local housing rehabilitation specialists who are part of the Community Development Administration (CDA) Special Loan Programs network.
- B. Each seminar shall cover:
  - 1. The writing of detailed specifications for home repairs to be financed with government funded programs, such as the federal CDBG and HOME programs, or State programs, and
  - 2. Methods for cost estimating rehabilitation projects, including the use of computerized cost estimating systems.

**3.2 Training Curriculum and Material**

- A. The Contractor shall develop the training curriculum in conjunction with DHCD staff and provide, at minimum, the following training material:
  - 1. Student workbooks that contain detailed notes on conducting home inspections, completing detailed specifications for repairs to be made to residential properties and cost estimating jobs, including illustrations as appropriate. The workbooks shall be in standard 8 ½ by 11 inch format, professional in appearance, and permanently bound or spiral bound for easy use and portability.
  - 2. Audio-visual tools for instruction (i.e. Microsoft PowerPoint or other DHCD approved electronic presentation tools).

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3. Supplemental classroom handout materials for students as appropriate.
- B. The Contractor shall submit proposed training material to the DHCD Contract Manager for review and approval at least two (2) weeks before the first scheduled training session, and provide final training material to the DHCD Contract Manager at least three (3) days before training begins.

**3.3 Training Sessions**

- A. The Contractor shall:
  1. Conduct the two (2) one-day training sessions, which will include approximately 30 – 40 attendees for each session, at DHCD's offices located at 100 Community Place, Crownsville, Maryland, or at a nearby facility as arranged by DHCD. Both seminars shall be completed not later than December 18, 2009, unless otherwise directed by DHCD, with specific dates to be determined by DHCD in consultation with the Contractor.
  2. Use PowerPoint (or similar software), a computer and an LCD projector to conduct the training. Equipment may be provided by DHCD upon request by the Contractor
  3. Provide each attendee with a certificate indicating completion of the seminar.
  4. Provide and distribute seminar evaluation forms to each seminar attendee. The completed forms will be collected from the attendees by the Contractor and returned to DHCD after each session.
  5. Deliver all presentation materials that are owned by DHCD as stated in Section 1.11 to the DHCD Contract Manager in electronic format upon completion of the training sessions.
  6. Provide a copy of the student workbook to the DHCD Contract Manager.
  7. Make available to DHCD for use at its discretion all training material developed as a result of this Contract and/or used during the training sessions
- B. DHCD will provide suitable training rooms, arrange for the registration of attendees, notify the Contractor of the approximate number of attendees prior to the scheduled training sessions, and be responsible for any refreshments.

## **SECTION 4 – PROPOSAL FORMAT**

### **4.1 Overview**

The Offeror's Technical Proposal should be prepared in a straightforward and concise manner, detailing the Offeror's capabilities to satisfy the requirements of this RFP and should conform to the Outline listed in Section 4.2.B below.

### **4.2 Technical Proposal**

#### **A. General:**

Offerors shall submit, under separate cover, a clearly marked unbound original and three (3) copies of the Technical Proposal in a separate sealed envelope titled "Training for CDA Special Loan Programs Housing Rehabilitation Specialists - Technical Proposal."

Offerors should include a transmittal letter on the Offeror's stationery, signed by an individual who is authorized to bind the company to all statements in the proposal and the services and requirements as stated in the RFP.

#### **B. Outline:**

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#### **1. Tab 1 – Minimum Qualifications**

The Offeror shall demonstrate that it meets the qualifications outlined in Section 2 by providing evidence that it has at least five (5) years experience providing training services to local or state government staff in the area of housing rehabilitation, specifically as related to specification writing and cost estimating.

#### **2. Tab 2 – Executive Summary**

The Offeror shall condense and highlight the contents of the Technical Proposal in a separate section titled "Executive Summary." The summary shall provide a broad overview of the Offeror's understanding of the contents of the RFP and of the how the Offeror's proposal meets the scope of services outlined in Section 3. If any addendum or amendments have been issued to this RFP, the Offeror shall acknowledge same in this section. Also, any exceptions to this RFP or the terms and conditions outlined in Attachment A or any other attachment must be clearly identified in this section. Exceptions may result in the proposal being rejected or not reasonably susceptible of being selected for award.



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**3. Tab 3 – Approach to Services**

The Offeror shall address the scope of work as presented in Section 3 of the RFP and describe how it proposes to meet the requirements for services.

**4. Tab 4 – Samples of Work**

The Offeror shall provide samples of work such as training materials, course descriptions, curricula summaries, ensuring they are clearly labeled as to content.

**5. Tab 5 – Summary of Experience**

The Offeror shall describe its previous experience providing training services to local or state government staff in the area of housing rehabilitation.

**6. Tab 6 – References**

The Offeror shall provide the names, addresses, and telephone numbers of at least three (3) current clients that may be contacted as references. Provide the name of the organization, mailing address, point of contact name, telephone number and email, and a description of the services rendered. DHCD reserves the right to call any known former or current client.

**4.3 Price Proposal**

Submit an unbound, clearly marked original and three (3) bound copies of the Price Proposal in a separate sealed enveloped titled “Financial Proposal – Training for CDA Special Loan Programs Housing Rehabilitation Specialists.” The Price Proposal must be in the format specified in Attachment B and be signed by an official authorized to bind the Offeror.

**SECTION 5 – EVALUATION PROCEDURE AND CONTRACT AWARD**

**5.1 Evaluation Committee**

The Procurement Officer shall establish an Evaluation Committee, which may include individuals from within or outside of State government. The Procurement Officer reserves the right to reject in whole or in part any and all proposals received as a result of this RFP, to waive minor irregularities in proposals, and to enter into discussions with all responsible Offerors in any manner deemed necessary to serve the best interest of DHCD and the State. Offerors whose proposals are not accepted will be notified in writing.

## **5.2 Discussions/ Oral Presentations**

All Offerors who appear to be responsible and whose proposals are initially classified as being reasonably susceptible of being selected for award (or potentially so) may be required to make oral presentations of their proposals and participate in discussions with the Evaluation Committee. Offerors will be notified as to a date for oral presentations /discussions. Offerors must confirm in writing any substantive oral clarification of their proposal made in the course of discussions and all written clarifications will become part of the Offeror's Technical Proposal.

Price Proposals from only those responsible Offerors whose proposals are finally deemed reasonably susceptible of being selected for award will be opened following the discussion and presentation process.

If, following the opening of the price proposals, the Procurement Officer determines that further discussion is in the best interest of DHCD and the State, the Procurement Officer will notify all of the Offerors of the date on which such discussions will be conducted. Upon completion of all discussions and upon receipt of any "best and final offers" submitted as a result of such discussions, the Evaluation Committee shall recommend to the Procurement Officer the award of the Contract to the responsible Offeror whose combined technical and price proposal is determined to be the most advantageous to DHCD and the State.

## **5.3 Technical Proposal Evaluation Criteria**

The Evaluation Committee will conduct their evaluation of the Technical Proposals received on the basis of the following criteria in descending order of importance:

- A. Approach to Services, as described in Section 4.2, Tab 3 and 4.
- B. Experience, as described in Section 4.2, Tabs 5 and 6

## **5.4 Price Proposal Selection Criteria**

Price Proposals will not be opened until the evaluation of the Technical Proposal is complete. The Price Proposal evaluation will be based upon the prices submitted by the Offeror on Attachment B – Price Proposal Form, and best and final offers, if any. Proposals will be ranked in order from lowest to highest cost to the State.

## **5.5 Weighting of Technical and Price Proposals**

The Technical Proposal will have greater weight than the price proposal in determining the most advantageous offers.

## **5.6 Contract Award**

It is DHCD's intention to award the contract to the Offeror whose proposal is determined to be the most advantageous to the State.